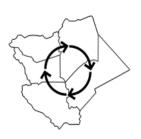
# Inter-Regional Local Government Checklist Project

Summary Report
May 24, 2000 (updated September 2000)

# INTER-REGIONAL PARTNERSHIP Alameda County Contra Costa County San Joaquin County Santa Clara County Stanislaus County



# **Background**

The Inter-Regional Partnership (IRP) is a voluntary partnership between fifteen elected officials representing five counties (San Joaquin, Stanislaus, Alameda, Contra Costa, and Santa Clara) and ten cities (two from each of the counties). The fifteen IRP members came together in 1998 to grapple with the challenges of serious imbalances in jobs and housing growth across the five-county area.

Alameda, Contra Costa, and Santa Clara Counties will produce 840,000 new jobs in the next 20 years. Projections indicate that over 200,000 new Bay Area workers will live outside the region by 2020. Central Valley communities in San Joaquin and Stanislaus Counties will provide a considerable portion of the needed housing for these workers. Increasing numbers of long distance commuters generated by land use decisions has serious impacts on transportation, our environment and general quality of life.

The IRP has representatives from communities on opposite ends of the same problem. Each of its member's communities is faced with different aspects of the situation: rapid, imbalanced and uncoordinated growth. The Partnership has developed an action plan to achieve the following goals:

- Achieve a more equitable jobs/housing balance.
- Improve transportation and air quality.
- Enhance the quality of life throughout our inter-regional area.
- Pursue inter-regional economic development opportunities.
- Establish more sustainable methods of moving people between their homes and distant jobs.

# **Checklist Overview**

The Inter-Regional Local Government Checklist Program is the IRP's first significant research undertaking. The Checklist program is intended to identify local planning tools that might successfully address inter-regional challenges across the five-county area.

The Checklist identifies 45 specific strategies designed to mitigate the inter-regional jobshousing mismatch and improve the overall quality of life for the residents of the five counties. Local jurisdictions were asked to identify which strategies they have initiated, might consider implementing, or have considered and rejected.

The purpose of the Checklist project is twofold:

- 1. The results from the checklist will allow the Partnership to assess which of their priority areas need more attention both geographically, and in terms of strategies/actions. This will allow the IRP to effectively target future efforts to promote progressive land-use and transportation planning (through incentives and rewards) at the areas where they will have the greatest impact.
- 2. Once compiled and distributed, the checklist results will enable cities to learn from each other about what works and what does not. Municipalities will also be able to learn from their neighbors about how to successfully implement particular strategies. It is also hoped that the program will encourage cities to incorporate an inter-regional perspective into their future planning efforts.

# Chronology

Association of Bay Area Governments staff drafted the initial Checklist with the assistance of the San Joaquin Council of Governments and the Stanislaus Council of Governments. Comments and suggested revisions were collected from the Planning or Community Development Directors of each of the fifteen member jurisdictions. This revised Checklist was approved by IRP members and distributed back to the fifteen member jurisdictions for completion in May 1999.

Planning departments filling out the Checklists were requested to take the completed Checklists to the jurisdiction's governing board for review/approval. This was intended to inform elected officials around the region about the IRP, as well as to insure that the results of the Checklist program would serve as an accurate political barometer.

The preliminary results from the member jurisdictions were collected during summer 1999 and presented to the IRP at the fall quarterly meeting. With member approval, the Checklist was distributed for completion to planning directors in the remaining fifty-four cities in the five counties in November 1999. Completed Checklists were collected between January and July 2000. As of July 26, 2000, Checklists had been received from all five member counties and from 47 of the 64 cities in the five-county area. We do not anticipate further Checklists will be returned without additional staff and member effort.

# **Result Highlights**

A brief discussion of the four most common response patterns to the 45 strategies in the Checklist follows. For more detailed results, refer to the attached table of results by county. If desired, staff can provide complete results by jurisdiction.

### Majority responded "Already Completed or Underway"

One common response pattern is that the majority of jurisdictions reported they have already completed the recommended strategy or action, or that implementation is currently underway. As an example, Figure 1 illustrates how jurisdictions responded to

the action: "Complete a thorough inventory of vacant lands in your jurisdiction." (The numbers indicate how many jurisdictions responded with each answer).

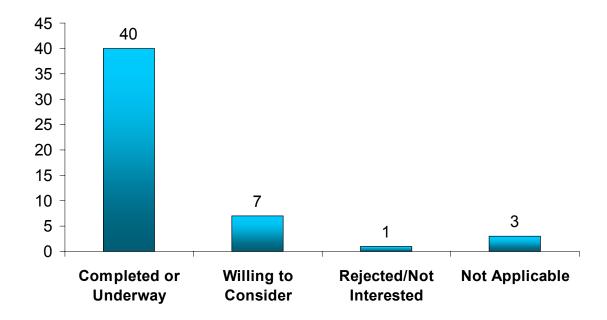


Figure 1: Checklist responses to: "Complete a thorough inventory of vacant lands in your jurisdiction."

Other strategies that the majority of jurisdictions report they have already completed, or are currently implementing include:

- Assign and fund staff contacts for specific projects to guide projects through the entire approvals process as efficiently as possible.
- Establish General Plan and zoning strategies which encourage the provision of affordable housing units (or the payment of in-lieu fees) in new residential developments.
- Subsidize affordable housing projects by reducing development fees or pursuing proactive programs designed to assist in construction of affordable units.
- Establish and enforce urban growth boundaries.
- Reduce parcel size for new single-family residential developments.
- Adopt long-term policies designed to retain and preserve agricultural lands and other open spaces.
- Create and support designation of redevelopment areas in urban cores and give these areas the highest planning priority in the local jurisdiction.

This information is valuable, as it will reduce the risk of tailoring incentives to encourage local governments to take actions that have already been implemented. Clearly, the IRP should not focus on persuading local jurisdictions to adopt strategies that they already use.

### Majority responded "Rejected/Not Interested"

Several proposed actions were almost unanimously unpopular across the five-county IRP area. As an example, Figure 2 illustrates how jurisdictions responded to the strategy: "Discourage free employee parking at new employment sites."

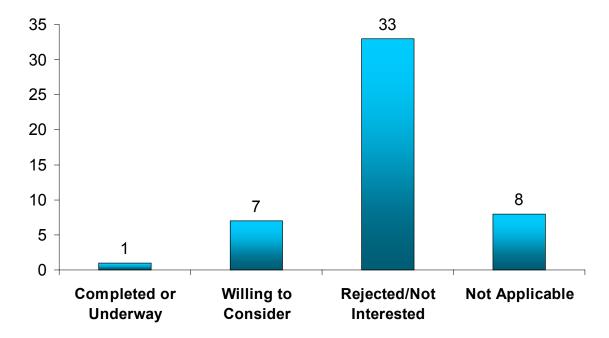


Figure 2: Checklist responses to: "Discourage free employee parking at new employment sites."

Another strategy that the majority of jurisdictions report they have rejected or are not interested in considering is:

 Implement a housing impact fee on new commercial and industrial projects to be used for the provision of affordable housing units.

The IRP would be ill advised to concentrate on encouraging local governments to adopt strategies and actions they have already rejected.

### Majority responded "Willing to Consider"

Some of the proposed actions in the Checklist were met with more enthusiasm by responding jurisdictions. As an example, Figure 3 illustrates how jurisdictions responded to the strategy: "Adopt policies encouraging new employers and contractors to search for skilled workers locally."

Other strategies that the majority of jurisdictions report they are willing to consider include:

- Adopt policies encouraging local workers to occupy new housing units.
- Establish tax increment financing and abatements for brownfield developments.
- Form partnerships with transit agencies to develop financing and other strategies for new development projects around stations.

- Promote telecommuting through promotional materials/programs.
- Establish telecommuting programs for city/county workers.

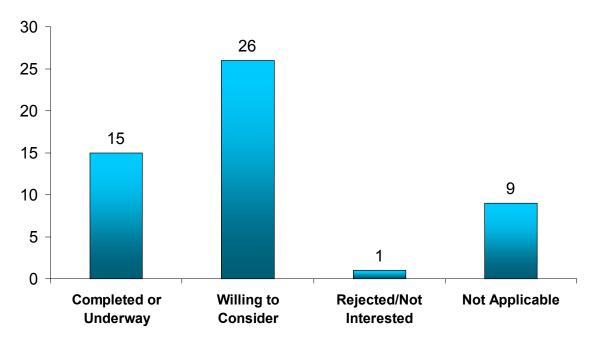


Figure 3: Checklist responses to: "Adopt policies encouraging new employers and contractors to search for skilled workers locally."

These strategies, to which a large percentage of jurisdictions reported they have not adopted but are willing to consider, represent one of the greatest opportunity areas revealed by the Checklist. Focusing new incentives on encouraging jurisdictions to pursue the above strategies/actions would likely result in considerably more participation among the jurisdictions surveyed.

### Jurisdictions split between "Completed or Underway" and "Willing to Consider"

Jurisdictions were frequently split between having completed the recommended strategy and being willing to consider implementing it. As an example, Figure 4 illustrates how jurisdictions responded to the strategy: "Study housing potential or higher densities on currently developed sites."

Other strategies that received both considerable "completed or underway" responses and considerable "willing to consider" responses include:

- Make the General Plan and zoning code encourage residential development in conjunction with commercial projects.
- Match economic development efforts (to attract employers) to the skills of the area's employees.
- Match affordability of housing to job income levels in municipality.
- Participate in workforce development programs that encourage schools/colleges to educate/train residents for targeted employees.

- Assist neighborhoods in understanding the need for providing housing and employment in suitable locations.
- Consider minimum density requirements for all new projects within a set distance of public transit stations.
- Advocate employer-subsidized transit passes for all employers located near transit facilities.

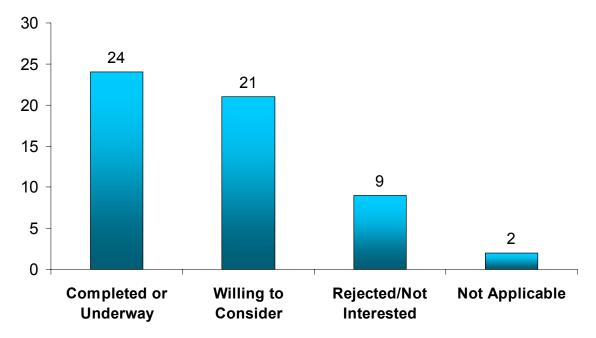


Figure 4: Checklist responses to: "Study housing potential or higher densities on currently developed sites."

These strategies represent another significant opportunity area revealed by the Checklist. Because a number of jurisdictions in the five-county area have already adopted or are currently implementing these actions/strategies, their experiences will be useful to those jurisdictions that reported they are "willing to consider" them.

## **Result Weaknesses**

There are two primary weaknesses with the results of the Checklist: 1) A response rate of 75% and 2) the fact that very few of the completed Checklists were taken to city councils for review and approval.

The 75% response rate is troublesome because it means that we don't know the positions of one in four of our cities on any of the strategies in the Checklist. This has the potential to limit the effectiveness of focusing incentives based on the results of the Checklist. However, we do have the benefit of good geographic coverage in returned Checklists.

The fact that only a handful of planning departments completing Checklists took the completed Checklists before their councils for review is not necessarily a serious weakness. Most of the strategies/actions in the Checklist would be governed by a city's general plan – a document with which the planning department is normally very familiar. In cases where the general plan has recently been updated and adopted by council, the

responses are probably suitable for use in gauging the political attitudes toward certain policies and actions.

# **Applications – Next Steps**

The IRP Checklist has provided the Partnership and participating Councils of Governments with valuable information on what local governments are currently doing to encourage better inter-regional growth patterns. More importantly, the Checklist gives us some insight to what strategies and actions local governments might be willing to consider implementing in the future. The task before the IRP is to create the incentives necessary to persuade local governments to implement those strategies they are currently "willing to consider".

### Possible next steps for the IRP

- Use Checklist results in conjunction with the State-Sponsored Pilot Project.
   Encourage State to use Checklist information on preferred strategies to tailor incentives for application to the designated Jobs-Housing Opportunity Zones.
- Pursue other programs to build new incentives to capitalize on opportunity areas ("willing to consider" strategies/actions).
- Collecting information on how jurisdictions have approached implementing specific strategies/actions and make that information available to all jurisdictions that are "willing to consider" implementation.

Appendix
Inter-Regional Partnership Checklist Results
Totals by County



Inter-Regional Partnership Checklist Results: Totals by County July 2000  I. BRINGING JOBS AND HOUSING CLOSER TOGETHER: 1. CREATE MORE HOUSING OPPORTUNITIES NEAR EMPLOYMENT CENTERS.	Alameda County Totals	Contra Costa County Totals	San Joaquin County Totals	Santa Clara County Totals	Stanislaus County Totals	FIVE COUNTY TOTALS	AVAILABLE RESPONSES
A. Complete a thorough inventory of vacant lands in your	8	13	5	8	6	40	Completed or Underway
jurisdiction.		1	3	1	2	7	Willing to Consider
	1			1 2		3	Rejected/Not Interested
B. Study housing potential or higher densities on currently	6	7	1	7	3		Not Applicable Completed or Underway
developed sites.	3	7	5	3	3		Willing to Consider
developed cities.	1	1	3	2	2	9	Rejected/Not Interested
				2		2	Not Applicable
C. Amend the General Plan and zoning on undeveloped	7	9	2	9	3	30	Completed or Underway
or under-utilized commercial and industrial lands to allow	3	6	4	1	3	17	Willing to Consider
residential or mixed-use.			2		3	5	Rejected/Not Interested
				3		3	Not Applicable
D. Make the General Plan and zoning code encourage	5	11	2	6	3	27	Completed or Underway
residential development in conjunction with commercial	4	2	5	4	3		Willing to Consider
projects.		1	1	1	3	6	Rejected/Not Interested
E. Revitalize neglected neighborhoods to provide a wide	5	10	4	6	4	29	Not Applicable Completed or Underway
range of housing opportunities.	2	10	4	1	5		Willing to Consider
range of housing opportunities.	1	'	7	•	J		Rejected/Not Interested
	3	4		5			Not Applicable
F. Assess and attempt to minimize discretionary permit	3	5	3	4	3	18	Completed or Underway
requirements (use permits, etc.) applicable to proposed	1	2	4	2	2	11	Willing to Consider
housing near employment centers.	3	3	1	2	1	10	Rejected/Not Interested
	2	5		5	2	14	Not Applicable
G. Assign and fund staff contacts for specific projects to	9	8	5	6	5	33	Completed or Underway
guide projects through the entire approvals process as	1	4	2	1	1	9	Willing to Consider
efficiently as possible.		2	1	2	2	4	Rejected/Not Interested
H. Establish General Plan and zoning strategies which	7	10	6	9	4	6 36	Not Applicable Completed or Underway
encourage the provision of affordable housing units (or	2	2	2	3	2	11	Willing to Consider
the payment of in-lieu fees) in new residential	_	1	_	1	2	4	Rejected/Not Interested
developments.		1		•	_	1	Not Applicable
I. Implement a housing impact fee on new commercial	3	1	1	2		7	Completed or Underway
and industrial projects to be used for the provision of	4	4	2	4		14	Willing to Consider
affordable housing units.	3	8	5	3	8	27	Rejected/Not Interested
		1		3		4	Not Applicable
J. Subsidize affordable housing projects by reducing	8	8	6	8	6	36	Completed or Underway
development fees or pursuing proactive programs	1	4	2	2	1	9	Willing to Consider
designed to assist in construction of affordable units.		2	1	1	1	5	Rejected/Not Interested
				ı	ı	2	Not Applicable

Inter-Regional Partnership Checklist Results: Totals by County July 2000	Alameda County Totals	Contra Costa County Totals	San Joaquin County Totals	Santa Clara County Totals	Stanislaus County Totals	FIVE COUNTY TOTALS	AVAILABLE RESPONSES
K. In areas where commercial development is outpacing	1	1		2	1	5	Completed or Underway
residential construction, establish programs which either	2	1		1		4	Willing to Consider
limit new commercial development until housing growth	2	3	1	4	3	13	Rejected/Not Interested
catches up	5	9	7	6	4	31	Not Applicable
2. BRING PEOPLE AND THEIR JOBS CLOSER TOGETHER.							
A. Match economic development efforts (to attract	8	7	6	4	2	27	Completed or Underway
employers) to the skills of the area's employees.	1	3	2	3	4		3
	1	3			1		Rejected/Not Interested
		2		5	1	8	Not Applicable
B. Match affordability of housing to job income levels in	2	7	3	5			Completed or Underway
municipality.	2	3	4	2	3	14	Willing to Consider
	2	4		1	1	8	Rejected/Not Interested
	1	1	1	4	3		Not Applicable
C. Adopt policies encouraging new employers and	5	4	2	2	2	15	Completed or Underway
contractors to search for skilled workers locally.	4	5	6	6	5		Willing to Consider
		1				1	Rejected/Not Interested
		4		4	1	9	Not Applicable
D. Adopt policies encouraging local workers to occupy	1	2		5		8	Completed or Underway
new housing units.	7	4	6	2	4		Willing to Consider
		2	1	2	1		Rejected/Not Interested
C. Double in the in world area development are groupe that		6		J	3		Not Applicable
E. Participate in workforce development programs that	6	5	5	5	3		Completed or Underway
encourage schools/colleges to educate/train residents for	3	6	3	2	4	3	Willing to Consider
targeted employees.	1	2		1	1	8	Rejected/Not Interested Not Applicable
II. ESTABLISH MORE SUSTAINABLE METHODS OF	1			4	-	0	Not Applicable
MOVING PEOPLE BETWEEN HOMES AND JOBS:  1. CREATE A MORE EFFICIENT PATTERN OF LAND USE.							
A. Establish and enforce urban growth boundaries.	5	9	4	8	2	28	Completed or Underway
5		1	3		5		Willing to Consider
		1			1		Rejected/Not Interested
	4	3	1	4		12	Not Applicable
B. Modify General Plan and zoning codes to increase	5	5	1	6	2	19	Completed or Underway
allowable intensity of development within local urban	2	5	6	1	4	18	Willing to Consider
growth boundaries.	2	2	1	1	2	8	Rejected/Not Interested
		2		4		6	Not Applicable
C. Establish Transfer of Development Rights (TDRs)	3	3	1	1		8	Completed or Underway
programs which allow for the preservation of open space	2	4	7		6		Willing to Consider
on the urban fringe and intensify land use within existing	2	3	1	6	1		Rejected/Not Interested
developed areas.	2	4		5	1	12	Not Applicable

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D. Establish tax increment financing and abatements for	2	1	_	1	,	4	Completed or Underway
brownfield developments.	4	5	5	3	6	23	Willing to Consider
	2	_	1	1	1	2	Rejected/Not Interested
T. Taka advantana af managana lika tha Milliana an Ast	3	8	2	7	2		Not Applicable
E. Take advantage of programs like the Williamson Act	4	3	4	6	3	20	Completed or Underway
and the Farmland's Trust to preserve agricultural lands	2	3	3		4	12	Willing to Consider
and open space on the urban fringes.	4	0	1	-	1	20	Rejected/Not Interested
E. Boduco porcel size for new single family residential	6	9 7	1	5 6	5	20 28	Not Applicable
F. Reduce parcel size for new single family residential	1	4	2	1	1	9	Completed or Underway Willing to Consider
developments.	1	2	2	4	2	11	Rejected/Not Interested
	1	1		2		4	Not Applicable
G. Assist neighborhoods in understanding the need for	3	5	3	7	2	20	Completed or Underway
providing housing and employment in suitable locations.	3	6	4	4	5	22	Willing to Consider
providing flousing and employment in suitable locations.	1					1	Rejected/Not Interested
	1	3	1	2	1	8	Not Applicable
H. Adopt long-term policies designed to retain and	6	12	8	9	4	39	Completed or Underway
preserve agricultural lands and other open space areas.	1	2	1		4	8	Willing to Consider
							Rejected/Not Interested
	3	1		4		8	Not Applicable
I. When planning major additions to cities and towns,	4	2	2	5	5	18	Completed or Underway
ensure they work towards a community wide or	1	7	4	1	3		Willing to Consider
subregional jobs/housing balance.		_	1			1	Rejected/Not Interested
	4	5	1	6	_	16	Not Applicable
J. Assess fees, require dedications or adopt conditions of	6	7	8	6	5	32	Completed or Underway
approval to accommodate extension of transit and bicycle	3	5		1	2	11	Willing to Consider
facilities in newly developed areas.		2		1	1	2 6	Rejected/Not Interested Not Applicable
K. Adopt transit station area specific plans or	7	6	1	6	1	21	Completed or Underway
redevelopment plans for all areas within walking distance	2	2	5	2	3		Willing to Consider
which include a mix of uses and the highest residential	_	_	J		J	17	Rejected/Not Interested
and commercial densities	1	6	2	4	4	17	Not Applicable
L. Consider minimum density requirements for all new	6	3	_	3	1	13	Completed or Underway
projects within a set distance of public transit stations.	3	3	5	4	3	18	Willing to Consider
. ,		3	1	2		6	Rejected/Not Interested
	1	6	2	4	4	17	Not Applicable
M. Form partnerships with transit agencies to develop	6	2	1	3		12	Completed or Underway
financing and other strategies for new development	3	6	5	5	3	22	Willing to Consider
projects around stations.							Rejected/Not Interested
	1	6	2	4	5		Not Applicable
N. Study the capital and long-term maintenance costs of	5	4	5	2	3	19	Completed or Underway
providing municipal services and infrastructure expansion		5	2	2	3	12	Willing to Consider
to serve new fringe area development and implement a	1	-	4			1	Rejected/Not Interested
policy framework	4	5	1	8	2	20	Not Applicable

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O. Discuss a tax-revenue sharing program with	1	3			5	9	Completed or Underway
neighboring communities.	5	5	4	4	3	21	Willing to Consider
	4	5	4	5		18	Rejected/Not Interested
		1		3		4	Not Applicable
2. IMPROVE THE EFFICIENCY OF THE EXISTING TRANSIT SYSTEM							
A. Provide local bus connections to VTA, ACE or BART	7	9	3	6	2	27	Completed or Underway
by working with local transit providers to evaluate and	2	5	3	4	3	17	Willing to Consider
propose route modifications.			1			1	Rejected/Not Interested
	1		1	2	3	7	Not Applicable
B. Implement dial-a-ride programs to link existing low	3	5	4	1	3	16	Completed or Underway
density areas to nearby transit lines.	5	7	3	6	3	24	Willing to Consider
		1		2		3	Rejected/Not Interested
	1	1	1	3	2	8	Not Applicable
3. PROMOTE DYNAMIC AND VIBRANT URBAN CORES.							
A. Create and support designation of redevelopment	7	11	6	7	5	36	Completed or Underway
areas in urban cores and give these areas the highest	1	1	2	2	3	9	Willing to Consider
planning priority in the local jurisdiction.	1					1	Rejected/Not Interested
		2	1	3			Not Applicable
B. Direct transportation funding to projects within existing	3	5	4	2	1		Completed or Underway
urban areas that reduce dependence on cars and protect	4	3	1	5	6		Willing to Consider
open space.		1	2	1			Rejected/Not Interested
		5	1	4	1		Not Applicable
C. Encourage sponsors of major regional projects (sports,		5	2	5	1		Completed or Underway
entertainment, employment) to build in existing downtown	2	1	1	1	5		Willing to Consider
areas well served by transportation infrastructure.		1	_		•	1	Rejected/Not Interested
4. ENGOLIDAGE ALTERNATIVE COMMUTANO	3	7	5	6	2	23	Not Applicable
4. ENCOURAGE ALTERNATIVE COMMUTING SOLUTIONS.							
A. Promote telecommuting through promotional	2	6	2	4			Completed or Underway
materials/programs.	6	7	6	5	8		Willing to Consider
				1			Rejected/Not Interested
		1		2		3	Not Applicable
B. Establish telecommuting programs for city/county	2	3	1	2	1	9	Completed or Underway
workers.	4	9	5	7	5		Willing to Consider
	2	_	1	1	1	5	Rejected/Not Interested
O Francisco adaptiva (fallower)	,	2	1	2	1	6	Not Applicable
C. Encourage adoption of alternative work schedules.	6	3	3	4	1	17	Completed or Underway
	1	9	5	7	4		Willing to Consider
		2	1	1	2		Rejected/Not Interested
		2	1	1	1	5	Not Applicable

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D. Advocate employer-subsidized transit passes for all	4	3		7	1		Completed or Underway
employers located near transit facilities.	4	8	6	3	3		Willing to Consider
		1					Rejected/Not Interested
	1	2	2	2	4	11	Not Applicable
E. Discourage free employee parking at new employment sites.	1					1	Completed or Underway
	2	1	2	2		7	Willing to Consider
	4	10	6	6	7	33	Rejected/Not Interested
		3		4	1		Not Applicable
F. Encourage employers to view employee parking as	2			3		5	Completed or Underway
subsidized and provide equal subsidies to workers who	5	5	6	3	1		Willing to Consider
use alternative modes to get to work.		4	2	3	4	13	Rejected/Not Interested
·		5		3	3		Not Applicable
G. Sponsor programs which encourage workers to use	3	5	4	7	3	22	Completed or Underway
transit and carpools.	4	9	3	3	5	24	Willing to Consider
	1		1			2	Rejected/Not Interested
				2	1	3	Not Applicable
H. Promote programs encouraging employees to	3	4	2	5	2		Completed or Underway
experiment with alternative modes of transportation. (like	5	9	5	4	5		Willing to Consider
Don't Drive One In Five)	1		1				Rejected/Not Interested
		1		3	1	5	
I. Encourage employer sponsored carpool programs and	3	4	2	7	2		Completed or Underway
shuttle bus services.	4	8	5	3	5		Willing to Consider
	2		1			3	Rejected/Not Interested
		3		2	1	6	Not Applicable